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EVALUATION OF THE USAID/JAMAICA SPECIAL DEVELOPMENT ACTIVITY FUND

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EVALUATION OF THE USAID/JAMAICA SPECIAL DEVELOPMENT ACTIVITY FUND



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Evaluation of the USAID/Jamaica Special Development Activity Fund

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EVALUATION: USAID/JAMAICA SPECIAL DEVELOPMENT ACTIVITY FUND

This is an evaluation of the USAID Special Development Activity Fund (SDAF). The SDAF is a USAID/Jamaica funded and managed program that provides grants of between \$2,000 and \$10,000 directly to Jamaican community groups. The projects funded fall within the Mission's areas of strategic interest, which currently includes economic growth, environment, health, education, and democracy and governance. USAID/Jamaica has been operating the SDAF Program since 1997. The program's current authorization period is from FY2000-FY2004, which coincides with the Mission's current Country Strategy.

A. SCOPE OF WORK

The Scope of Work (SOW) for the evaluation study emphasized the review and analysis of the following points.

- **SDAF Program Impact:** Determine the impact of the grants on the communities' quality of life.
- **Program Sustainability:** Determine the capacity of the communities that benefited from SDAF grants to sustain the projects.
- **Program Justification:** Determine the overall socio-economic situation of rural communities and the need for small grants?
- **SDAF Management:** Evaluate the process by which the small grants program is administered.
- **Program Expansion:** Show the benefits and lesson learned that may be applicable to expanding the program in Jamaica and in the Caribbean Region.

A complete copy of the SOW is included as Annex A.

B. EVALUATION METHODOLOGY

The following is the process used to evaluate the SDAF Program:

File review: USAID project files were reviewed to gain an overview of the program and to understand the details of particular grants. An SDAF project file is available for each grant and generally contains the funding proposal, correspondence between the grantee and USAID, and final reports. Final reports are mostly financial in nature but sometimes include a summary letter of accomplishments.

Field Visits: A total of seven projects were visited. Three sites were visited with Yolanda Hill, the SDAF Coordinator, and four sites were visited with Daniel Malone, the SDAF Disaster Relief Coordinator.

Meeting with SDAF Management Committee: A meeting was held with the SDAF Management Committee, which includes representatives from each of USAID's five technical offices, plus representatives from the Program Office. This meeting reviewed the management of the SDAF fund; discussed the impact of the fund and its relevance to USAID's development program; and explored opportunities to improve the SDAF Program.

Meetings with USAID/Jamaica Staff, including the Environment Team Leader (Howard Batson) and the Program Officer (Lynn Vega): The meeting with the Program Officer was held to gain the general perspectives of the Mission concerning SDAF, and the meeting with the SO2 Team Leader was held to discuss the management and impact of the program. The SDAF Program is managed out of the Office of Environment, and SO2 funds are used to cover the program's management costs.

Mission Presentation & Discussion: On February 28th, 2005, a briefing on preliminary findings, conclusions and recommendations was held for Mission staff. The SDAF Coordinator, the SDAF Management Committee and the Mission Director attended this meeting. A discussion was held on the management, impact and utility of the program, and comments have been considered in the finalization of this report. A PowerPoint presentation used for the meeting and has been provided to USAID/Jamaica.

C. SDAF DESCRIPTION AND PROFILE

The SDAF Program is funded through contributions from each of USAID/Jamaica's technical offices, with each strategic objective group contributing \$25,000 annually to the cost of the program. SDAF projects are funded by sector, with the contributions of each individual Strategic Objective (SO) Team allocated to support projects within its own sector, i.e. \$25,000 in SDAF grant funding is made available from the health sector SO and therefore \$25,000 in grants are allocated annually to community groups working on health-related issues. Several grant projects, however, are shared between SOs as, for example, sanitation projects in schools that are considered a split between the education and environment SOs.

This year's SDAF grant budget totals \$125,000 and is managed by an SDAF Coordinator. The SDAF Coordinator works sixty percent time on the project (three days per week). The costs of the SDAF Coordinator are intended to rotate among the various SO groups, but currently, and for the past several years, this cost has been covered by environmental SO funding. In 2004, twelve grants were awarded in the following areas:

- Sanitation – 38% (Environment)
- Repairs and Upgrade (basic & primary schools) – 25% (Education/Health)
- Community centers – 29% (Democracy and Governance)
- Small enterprise – 8% (Economic Growth)¹

Typical SDAF projects include:

¹ This breakdown of 2004 grants is taken from the USAID/Jamaica SDAF evaluation Scope of Work.

- Supporting the construction costs of additional classrooms at basic and primary schools;
- Purchase of computers for schools and community organizations for use in training programs;
- Construction of sanitation facilities for community use;
- Support for vocational training activities; and
- Various types of support for community youth groups.

SDAF has funded approximately \$300,000 in projects over the past three years. A list of SDAF projects funded over the past three years is included as Annex B.

1. SDAF MANAGEMENT AND GRANT SELECTION PROCESS

The following is a description of the process used to manage the SDAF Program.

- **Program Promotion:** The Program is not advertised and thus potential grantees contact USAID Field Contractors through referrals. Referrals are mainly word of mouth, but may also come from Peace Corps Volunteers, the US Embassy, and unsolicited phone calls for assistance made to the USAID Mission.
- **Grantee Inquiries:** Once a potential grantee contacts the SDAF Program, and if they appear to meet the general criteria of the fund, then they are provided guidelines, criteria and a suggested format for a proposal submission. Proposals may be submitted year-round, as there is no particular funding cycle. The availability of funding, however, is sometimes constrained by the timing of the contributions from individual SO teams.
- **Initial Proposal Review & Screening:** the SDAF Coordinator initially reviews the proposal and, if the proposal meets the program's general criteria, then a site visit is conducted to assess the organization and proposal concept. Site visits are conducted to get a better sense of prospective grantees and the activities they operate. A brief site visit report is produced for each prospective grantee visited.
- **Consideration by SDAF Committee:** If the SDAF Coordinator determines that the prospective grantee and project appear to meet SDAF criteria then the proposal is sent to the Management Committee for formal review. Proposals are scored by the Committee using the following criteria:

Criteria	Weight	Score
One that is primarily self-help in nature with approximately 50% of the costs of the activity, whether in materials, labor or cash, or in-kind contributions, provided by the community during the life of the USAID support.	30%	
An easily identifiable, discrete undertaking, which is non-governmental, apolitical and non-discriminatory with respect to religion.	15%	
One that will generate immediate impact and benefit a number of people, particularly the poor, in the recipient country.	15%	
Governed and/or organized by an efficient and responsible community organization that has ideally been in existence for at least	20%	

Criteria	Weight	Score
two years.		
Capable of independent sustainability once the project is completed.	20%	
Total	100%	

The aforementioned funding criteria are considered by the SDAF Management Committee when reviewing proposals. In addition, the Committee also considers the following issues when making grant-approval decisions:

- Sustainability and Maintenance issues should be adequately addressed.
- Prior to receiving SDAF funds, the community should have first sought other funding sources.
- SDAF funds should be adequate to complete the project.

Grant Agreement Signing: Once approved by the SDAF Management Committee, community group representatives travel to Kingston for grant signing and orientation. The grants are approved for a six-month period, although they may be extended if they encounter justifiable delays (which are common in construction projects or projects that involve significant equipment procurements). The Mission Director's signature is required to fully execute an agreement. Grantees generally receive their funds within three weeks or so of signing their grant agreements.

Grant Monitoring: As necessary, projects are visited during implementation and are always visited once an activity has been completed. In practice, half or more projects seem to be visited during implementation activity, and these visits are often coordinated with other SDAF trips. Project monitoring visits always involve the SDAF Coordinator and sometimes include a representative of the appropriate USAID technical office.

Closeout Reporting: A final accounting of funds disbursed must be submitted to USAID four weeks after the project's end date. Accounting for project funds requires that grantees submit receipts for all expenses. Narrative reports on the grant's completion is optional, but are sometimes provided.

2. FIELD PROJECTS VISITED

The following is a profile of the field projects that were visited as part of the evaluation study. A brief description of each project is contained in Annex D – Field Site Visits. These descriptions include organization, project description, funding levels and an assessment on each project's effectiveness and sustainability. Sustainability was considered in terms of whether or not the activity funded by USAID can be sustained after SDAF's assistance is complete.

Recipient	Location	Project	SO
Jamaica Association for the Deaf	Kingston	Hot Press Purchase – Book Bindery Operation	SO3 - Health
Guava Ridge	Mavis Bank, St. Catherine	Commercial Grade Stove Purchase – Vocational Training	SO1 – Economic Growth
Cornerstone Ministries	St. Catherine	Building Construction – Vocational Training	SO1 – Economic Growth
Walkerswood Farmers Group	Walkerswood, St. Ann	Pond liner for irrigation	SO2 - Environment
Barrack's Road Primary School	Montego Bay	School expansion: classrooms, library, computer lab	SO4 – Education
Breds	Sandy Banks. Treasure Beach, St. Elizabeth	School expansion, including bathrooms	SO2 - Environment
Portmore Marching Band	Portmore, St. Catherine	Band equipment	SO1 – Economic Growth

D. PROJECT CONCLUSIONS AND RECOMMENDATIONS

This section provides a summary statement of the overall program, based on site visits, file reviews and discussions with key managers and stakeholders. This section is organized by conclusions and recommendations, which are based on findings related to the individual projects visited. The results of the individual grants reviewed and visited are contained in Annex D.

1. PROGRAM IMPACT & SUSTAINABILITY

Conclusions: Without exception, projects are performing as designed and benefiting a significant number of people – hundreds of people, and perhaps more, had directly benefited from the seven projects visited.

Projects have a high success rate. The projects are relatively simple, risks of failure are minimal, and the success rate of projects is high.

There is a significant public relations benefit to USAID/Jamaica from the SDAF Program, and the program has a very positive reputation among participating community groups. The communities see the program as flexible, easy to use and relevant to their needs. The communities all seemed highly appreciative of the program and all were satisfied with their experience with SDAF, and with the support they received. Community representatives also stated that they felt that funds were delivered in a timely manner (much faster than other similar programs) and that

the program's requirements and regulations were easy to understand. Without exception, the grantees spoke quite positively about the program and about their interactions with the SDAF Coordinator.

Impact: The projects appear to be high impact, with all projects providing or enabling a direct and tangible impact. Benefits were numerous and included:

- Expanded classrooms that enable a better learning environment for primary school children;
- Accessibility of computers for student training and for teachers to use as a lesson preparation resource;
- Job skills training for a significant number of people, including in areas such as computer literacy, welding, hotel employment, garment making, cooking, English language, book binding, and electrician skills;
- Establishment of community centers, which are being used by the communities for a variety of social and education purposes;
- Job and income creation, including expanded crop production in Walkerswood; and
- Support for youth and community groups, such as the Portmore Marching Band, which provides a structured after school activity for several hundred band members and raises funds for the band to travel and perform annually in Florida.

In five of the seven sites visited, the services or facilities supported by SDAF grants were being used at the time of the visit, further reinforcing the usefulness and benefit of the activities that were funded. (The only exceptions were the Portmore Marching Band, which practices during the evenings, and the Walkerswood irrigation project, which was under construction and is not yet operational.)

Sustainability: All SDAF projects visited appear to be sustainable, i.e., the activities supported will continue indefinitely beyond the terms of SDAF support. The operational costs of the projects are all being covered from a source other than the SDAF grant, including from government financing (for teachers salaries), from community funds (the Portmore Marching Band), or from income generating activities (Walkerswood Farmers Group and the Jamaica Association for the Deaf).

Funds Leveraged: Significant funds have been leveraged through the SDAF Program. The requirement that at least 50% of the costs of projects be provided from the communities appears to have been met, and has probably been substantially exceeded (based on the projects visited during the evaluation). However, it is not possible to determine an estimate on the amount or ratio of funds leveraged as program-wide data is not readily available.

Several grantees indicated that their success in receiving USAID/SDAF grants had been helpful to them in raising money from other donors. This was particularly true for Cornerstone Ministries, which received its first grant from the SDAF and has since gone on to raise over a dozen grants from a wide variety of sources.

Cost-effectiveness: SDAF is cost effective to operate, based on the following findings:

- Operational/management costs are relatively low because there is no institutional contractor required. The program is managed directly by USAID/Jamaica.

- The ratio of funds disbursed to program costs appear to compare favorably with larger USAID projects, e.g. one staff person (60%) per \$125,000 of grants disbursed annually. Although the SDAF Program does not provide technical assistance to grantees, the projects are effective and achieve the benefits they are designed to achieve.
- The program is straightforward in its operations and selection of projects and does not require costly analytic studies or assessments.

Overall Conclusion: The SDAF is an effective and well-managed program. In addition, the program is cost-effective to operate.

Recommendation: In so long as USAID/Jamaica continues its commitment to support community-level development, the SDAF Program should continue to receive funding support.

2. PROGRAM MANAGEMENT: CONCLUSIONS AND RECOMMENDATIONS

Programming process and structure: The basic SDAF structure, including grant identification, review, approval and monitoring processes, are effective and do not require significant changes.

SDAF Management Systems: While the SDAF Program is very well managed, there are opportunities for meaningful incremental improvements. Currently there is not a good record of the number of project beneficiaries or the cost-share provided by the grantees. It would be in USAID's interest to collect better information on both of these topics.

The problems that are encountered in managing the SDAF Program have been minimal, but when problems do occur, they generally involve difficulty in getting an accurate accounting of expenses. Many of the grant recipients are not experienced in dealing with donor programs or in having to account for funds at the level of detail that is required by USAID. The SDAF Program is informal concerning accounting and reporting requirements, with the only requirement being that receipts are provided to USAID to permit an accounting of all funds.

RECOMMENDATIONS:

Financial Management: It is suggested that USAID provide a modest training session for each grantee on accounting requirements and process, including providing grantees a financial reporting template and examples. This could be in the form of a 30-45 minute training or overview for grantees provided at the time they come to Kingston to sign their grant agreements. Such training will likely have a useful pay-off in reducing intermittent accounting problems and will help to transfer financial management skills to community groups. In emphasizing this topic (through providing a short but structured training) SDAF will also be sending a message to grantees as to the importance of keeping proper financial records.

Information Management/Program Monitoring: The following recommendations are presented to enable the SDAF Program to maintain a more complete record of activity and accomplishments:

- Provide a summary record of project activities, status and impact, for each project funded. This should be a simple one or two page report per grant to be completed by the SDAF Coordinator. A sample template is included for consideration, and is presented as Annex C.
- Maintain a consolidated database of all grants. The following information should be considered for inclusion in the database: name of grantee; location; amount of funding approved; cost-share contribution; grant award date; closeout date; and number of beneficiaries. This information set would be a slightly expanded version of what is currently tracked by the SDAF Coordinator, and similar to the SDAF Project List information provided in Annex B. To maintain a complete historical record of project activity it is suggested that all data be kept in a single file, such as an Excel or Word file.
- Beneficiary information should be required from grantees as part of a final report requirement. While it is important to keep the SDAF Program simple and uncomplicated, it is a fair request to ask grantees to complete a short final narrative report, which can be submitted together with the final financial report (30 days after completion of the project). This report should contain the following information: a description of the completed activity, including the intended use; the number of persons expected to benefit per year; the cost-share contribution of the grantee; the plan for sustaining the activity, including sources of required funding; and general comments/suggestions. A sample suggested reporting format is included as Annex C.
- Consider standardizing information collection processes between the SPA program and the SDAF Program to provide a more complete picture of USG community support in Jamaica (financial & descriptions – consider including SPA & Ambassador's funds in tracking). This would enable USAID to provide annual information on USG community-level support in Jamaica.

Slightly improved information management systems should enable the project to provide a more complete picture of its operations and effectiveness, and permit the SDAF Program to operate on a self-assessment basis.

Coordination with SPA: The Peace Corps SPA Program and the USAID/SDAF Program are similar in nature and both could benefit from closer coordination. In particular, the SDAF Coordinator should participate as the USAID liaison with Peace Corps/SPA, which would include attending SPA meetings.

The benefits of closer SDAF and SPA coordination include the following:

- USAID's considerable development expertise, including its experience in managing the SDAF Program, will be helpful to Peace Corps in its review and selection of effective projects; and,
- It is helpful to SDAF to have Peace Corps Volunteers be involved, when possible, in the implementation and oversight of SDAF activities.

3. SDAF RELEVANCY TO USAID/JAMAICA COUNTRY PROGRAM

Conclusions: SDAF projects provide an interesting learning laboratory for better understanding community issues, structures and successful develop interventions in Jamaica. It would be an oversight to dismiss SDAF as not relevant to larger mission development agenda based solely on the relatively modest cost of SDAF projects.

In some cases, SDAF community-based projects may help to inform USAID program development/policy agenda. From the projects visited, the following examples offer lessons that have possible application to the Mission's broader development strategy.

- The Walkerswood project has successfully used long-term government land leases a way to enable farmers to benefit from infrastructure investments. Without the availability of a land lease for collective benefit the irrigation, investment would not have been practical. This is because: 1) the cost of providing irrigation to individual scattered farms would have been prohibitive (no economy of scale); and 2) without land titles, the irrigation investment would have likely been considered too risky by both the NWC and the farmers group.
- The BREDs community group has successfully linked hotel tourism and community development. This has been done by encouraging tourists to visit the local community; explaining to tourists the community's development challenges and capabilities; and finding ways to enable tourist to support local development initiatives. This effort has resulted in substantial contributions from tourists to support local development and, in particular, to support the local elementary school. Tourism is a prevalent activity in much of Jamaica and the program by BREDs offers an example of how other areas could similarly build tourism-community linkages.

The nature of SDAF Program allows the program to support innovative community organizations that might not meet the funding criteria of the larger USAID projects, or with whom USAID technical offices may not be familiar. Some SDAF-supported community organizations have performed exceptionally well, have undertaken innovative approaches to development, and proved themselves as effective and well managed. These organizations can be brought to the attention of the SO teams so that they can be considered for funding under the Mission's sectoral projects.

RECOMMENDATIONS

USAID/Jamaica should view the SDAF Program as a meaningful contributor to Mission's development strategy, and be cognizant of its potential to increase the knowledge of the technical staff as to community needs, structures and potential effective development interventions. Specifically, it is suggested that USAID:

- o Make an effort to at least periodically involve SO team members in site visits as SDAF offers a learning opportunity for how to structure effective community-level development programs in Jamaica; and
- o Continue to involve a cross-section of personnel in the review and selection of SDAF projects as this helps to promote useful mission cross-SO interaction.

One way for the mission to increase its community-level development support is to increase funding for SDAF. Alternatively, or in addition to increased SDAF funding, successful SDAF organizations can also be brought to the attention of technical offices so that they can be considered for support under USAID's larger sectoral projects (and perhaps receive larger amounts of grant funding than SDAF is able to provide). This process would enable SDAF to serve as an incubator for identifying and promoting new CBOs, and could further increase SDAF's relevance to the mission's overall development program.

4. PROGRAM EXPANSION – IN JAMAICA AND REGIONALLY

Conclusion – SDAF Expansion in Jamaica: In Jamaica, the SDAF can effectively absorb and manage additional funds. Currently, the SDAF Program is able to be selective in the projects it funds and there appears to be enough well-conceived proposals received to enable the program to increase its level of funding without sacrificing quality. The management of additional resources can also be easily scaled-up, as currently the SDAF Coordinator position is authorized at a level of effort of three days per week.

Conclusion – SDAF Regional expansion: Regionally, it would be difficult to operate the SDAF Program in a cost-effective manner. Program success relies on pre-award site visits and an ability to periodically visit projects that may encounter implementation challenges.

- This current SDAF management approach is successful but would not be cost-effective to operate regionally, e.g., a three-day trip would be required to conduct a pre-award visit in Dominica.
- It would be difficult to provide assistance for problem projects, which would likely be more numerous because, due to distance, it would be more challenging and difficult for USAID to make informed decisions about the proposals received.
- Without advertising, the lack of USAID presence in other countries would make identification of worthy projects more difficult. If the program were advertised, the number of proposals received could overwhelm the program.

Overall Conclusion on the SDAF Program: The SDAF has placed great faith in communities' ability to lead development and deliver project results with very little technical assistance or oversight. The communities that have received SDAF funds have upheld their obligations, to their communities and to USAID, and have successfully managed project grant funds and delivered development results.

For Consideration: Rename the project to *The USAID Community Partnership Fund*. The SDAF Program is an important and significant program to the communities who receive USAID grant funds.

Annex A: Scope of Work

USAID/Jamaica–CAR Special Development Activity Fund (SDAF) Performance Statement of Work

1. PURPOSE

The purpose of this statement of work is to provide an assessment of the activities undertaken within Special Development Activity Fund (SDAF) program. This assessment will include critical analysis of USAID/J-CAR SDAF's impact on economic development in local communities' island wide.

The information obtained from the assessment will be utilized to uncover new development opportunities as well as the capacity of the community to sustain these projects. The SDAF committee will also explore the benefits to increasing amount obligated to the fund as it is proposed that an increase will promote more innovative projects.

2. BACKGROUND

The Special Development Activity Fund (SDAF) is a United States Government grant program that provides limited financial resources (US\$2,000 – US\$10,000) to qualified community groups to complete small, constructive, self-help community activities. The program was developed in response to the need of small community-based organizations to access funding to address social and economic development objectives in the areas of primary health, basic education, productive enterprises in the community, and more recently local governance. The program demonstrates the U.S. Government's interest in the welfare and self-help endeavors of local communities in Jamaica.

The SDAF has been significant in enabling the Mission and the US Embassy to respond quickly to requests for small amounts of assistance from non-governmental and community-based organizations in areas outside the focus of the targeted activities, but within the scope of the Mission's strategy. During the life of the project, the program has awarded over 125 grants. In 2004, twelve (12) grants were awarded in the following areas:

- Sanitation - 38% (Environment)
- Repairs and Upgrade (basic & primary schools) -25% (Education/Health)
- Community centers – 29% (Democracy and Governance)
- Small enterprise – 8% (Economic Growth)

Grants are usually awarded in circumstances where the Mission's input empowers and enhances strong community groups and initiatives, with a community contribution to the project, in cash or kind, of not less than 50%. Characteristics of the SDAF projects are:

- Community demonstrated support for the activity.
- Alternative sources of support have been investigated.
- USAID support will complete the project.

As the Mission's funds were used to partner with local organizations as well as to leverage funds from other sources, these grants stimulated greater self-reliance and self-esteem, and stimulated institutional capability in local communities, particularly among the rural and urban poor.

The Mission just completed its final year of its 2000-2004 strategy, and will move into another 5-year strategy period. As USAID Special Development Activity Fund program begins to consider new programmatic areas, it has become necessary to assess the impact and evaluate the need to continue a program that has had marked accomplishments. By embarking on a comprehensive assessment it ensures that the SDAF Program identifies opportunities to maximize program impacts through development interventions, as well as combat some of the challenges that face NGOs and Community-based Organizations in their struggle to sustain their communities and their quality of life at the grassroots level.

3. SCOPE OF WORK

The contractor's main objective is to provide a comprehensive assessment of the program impact at the local level, and report on past and foreseen challenges. The contractor will address program opportunities and the potential for continued success in areas not currently explored by the program. USAID/Jamaica will consider the contractor's findings vital to the development of sustainable economic growth; improved quality of key natural resources in selected areas, the awareness of a healthy lifestyle, the importance of education to development, and local governance in communities throughout Jamaica.

Anticipated Objectives:

This assessment will be based on reviewing a total of eight grants (past and present) in a variety of parishes and /or capitals (St. Elizabeth, Kingston, Montego Bay, etc.).

- Determine the impact of the grants on the communities' quality of life (mini-interviews).
- Determine the capacity of the communities that benefited to sustain the projects
- Determine the overall socio-economic situation of rural communities and the need for small grants?
- Evaluate the process by which the small grants program is administered.
 - a. Describe the current process
 - b. What is the role of service clubs?
 - c. How can the service clubs be more involved?
 - d. Provide alternatives to the current process
- Show the benefits and lesson learned that may be applicable to expanding the program in Jamaica and Caribbean Region. Noting how a small grants program can make a remarkable difference at the grassroots level by identifying some the current constraints in the Caribbean Region and how USAID/Jamaica has addressed similar challenges through their small grants program (ONLY if time permits).

4. SPECIFIC TASKS

In undertaking this Scope of Work, the consultant will complete the tasks:

- Identify and review relevant background documentation on the Special Development Activity Fund, as well as gather information from other USAID Missions who have a similar program.

- Interview relevant stakeholders from past projects including USAID, Service Clubs, and other NGOs.
- Conduct detailed assessments of the impact the program has had island wide. Determine milestones to create better linkages, evaluate past projects current status, identify pressures affecting NGOs and community-based organization ability to obtain resources, and propose cost effective actions which can be taken to assure the sustainable use of those resources within the Mission's strategic scope.
 - For example, show how USAID's intervention allowed organizations to improve their quality of life through implementing economic development activities.
 - Identify the program's ability to continue to promote economic development island wide.
- In consultation with USAID, prepare a report of the assessment, based on the guidance provided. The report should be no more than 20 pages.
- Prepare and deliver a debriefing of findings to USAID.

5. DELIVERABLES

The expected deliverables from this assignment include the following:

- A schedule of proposed actions
- A draft report outlining the findings of the assessment and recommendations for the effectiveness of the program in the form of a verbal presentation aided by graphics to the SDAF committee and Mission Management.
- A final report of no more than 20 pages.

6. LEVEL OF EFFORT AND SCHEDULE REQUIREMENTS

To adequately perform this assignment, a ten (10) day level-of-effort is proposed. The desired period is February 1-10, 2005. This may require a six-day work week.

Proposed Schedule:

- | | |
|------------------------------|-------------|
| • Travel & Literature Review | Days 1 – 3 |
| • Field Work | Days 4 - 8 |
| • Write-up and Travel | Days 9 – 10 |

7. QUALIFICATIONS AND EXPERIENCE

The contractor will be required to provide one key person and/or a team with local expertise for this assignment.

Key Personnel:

- The qualified candidate will have the following credentials: A minimum of a Bachelor of Science in a relevant technical area; at least five years experience working in community development at the international level with NGOs and/or Community – Based Organizations. A wide range of experience in the following areas; economic growth, environment, health, basic education, and democracy and governance as it relates to the international sector.

8. RELATIONSHIPS AND RESPONSIBILITIES

The key person will report directly to the Deputy Team Leader of the Office of the Environment at USAID/Jamaica who will provide technical direction. This assignment will be carried out from Jamaica, in collaboration with the SDAF Project Management Assistant (USAID) to gather relevant information.

9. LOGISTICAL SUPPORT

The consultant will be responsible for all logistic support including arrangements for travel, preparation of reports, working and/or office facilities and secretarial assistance. USAID will provide a driver for travel purposes.

APPENDIX

REFERENCES

The reference reading list for this assignment includes, but is not limited to the following documents:

- Limited Scope Grant Agreement (SDAF)
- Mission Annual Report (Jamaica)
- Current and Past Grant Agreements

STAKEHOLDERS

The following organizations should be consulted as part of this exercise and others as so deemed necessary:

- USAID – Jamaica (including , Mission Management, past and present SDAF committee members as available)
- Kiwanis Club of Stony Hill
- Food for the Poor
- Mustard Seed Communities
- Rotary Club of Kingston
- Pell River Basic School
- Bluefield People's Community Association
- Jamaicans For Justice

Annex B: SDAF Project List

Updated: Mar-05

Name of Organization	Proposal	Amount	Activity Status	Grant Closed	SO Team Funds
Creative Craft Plus	Purchase of computers and Cane materials for the visually impaired)	10,000	Grant extended to 1/31/03. As of May 19, 2003 JA\$85,361.00 is not reconciled	August 31, 2001	Education (SO4)
Corinaldi Primary School - PTA	Construction of library facilities	10,000	Partially liquidated - receipts to be submitted	February 28, 2003	Education (SO4)
St. Andrew Parish Church	Construction of wall for Care Center	10,000	Partially liquidated - Contract amended awaiting signature of applicant	April 30, 2003	Education (SO4)
African Methodist Episcopal Church (AME), Basic School	Completion of refurbishing and expansion activities to the Basic school (including the construction of kitchen and bathroom)	10,000	Project in progress	August 31, 2003	Environment/Health (SO2/3)
Bethlehem Assembly Basic School	Completion of school building and construction of sanitation facilities	7,250	Project Completed on August 26, 2003 - awaiting receipts for final liquidation	August 31, 2003	Education (SO4)
Food For the Poor	Construction of physical therapy center and provision of basic equipment at Golden Age Home	9,441	Project Completion date- 8/31/03	August 31, 2003	Environment (SO2)
Guava Ridge Community Center	To equip the Guava Ridge Community baking and skill training program with baking equipment	8,000	Project Completed on April 26, 2003 -awaiting receipts for final liquidation	August 31, 2003	Economic Growth (SO1)

Updated: Mar-05

Name of Organization	Proposal	Amount	Activity Status	Grant Closed	SO Team Funds
Kiwanis of Stony Hill	Children's Educational Cyber Center	10,000	Project Completed on April 26, 2003 -awaiting receipts for final liquidation	August 31, 2003	Economic Growth (SO1)
Circle K Club , UHWI School of Nursing	Refurbishing of the Olympic Gardens Health Center	8,000	Project in progress	October 31, 2003	Education (SO4)
Ebony Grove	Development of teaching facilities in the areas of Information Technology, Home Economics, and General Sciences	10,000	Project Completed on October 31, 2003 - awaiting receipts for final liquidation	October 31, 2003	Education (SO4)
Portmore Pacesetters Marching Band	Purchase of musical equipment for use by youth in community marching band	10,000	Project Completed on October 31, 2003 - awaiting receipts for final liquidation	October 31, 2003	Economic Growth (SO1)
Children First	Expansion of containers and sanitation facilities	8,800	Project Complete	November 30, 2003	Environment (SO2)
The Rotary Club of Kingston, District 7020	Establishment of a computer facility	10,000	Project Complete	November 30, 2003	Education (SO4)
Red Hills Communities Development	Establishment of Community Center and Sports Club	10,000	Project Complete	December 31, 2003	Environment (SO2)
Barracks Road Primary School	Completion of additional classrooms	10,000	Project Complete	January 31, 2004	Education (SO4)
Family and Parenting Center	To purchase equipment for the center	10,000	Project Complete	January 31, 2004	Economic Growth (SO1)
First Step Basic School	Expansion of current classroom facility, and re-roofing of existing classrooms	10,000	Project Complete	January 31, 2004	Education (SO4)
Irish Town Community Computer Centre	Purchase of 15 computers	10,000	Project Complete	January 31, 2004	Economic Growth (SO1)

Updated: Mar-05

Name of Organization	Proposal	Amount	Activity Status	Grant Closed	SO Team Funds
Seaward Primary & Junior High School	Building of Reading Lab and purchasing of Books	10,000	Project Complete	January 31, 2004	Education (SO4)
Jamaica Association for the Deaf	Purchase of a Hot Stamp Machine	10,000	Project completed	February 29, 2004	Health (SO3)
Riverside Open Bible Tabernacle	Completion of additional classrooms	10,000	Project completed	March 31, 2004	Education (SO4)
BREDS, Treasure Beach Foundation	Sandy Bank Primary School Expansion	10,000	Project completed	April 30, 2004	Environment (SO2)
Strambi Health Center	Purchase of health equipment for the center	5,000	Project in progress	May 31, 2004	Environment/Health (SO2 and SO4)
Promise Learning Center	Purchase of musical/concert equipment	5,000	Project in progress	June 30, 2004	Education (SO4)
Rotary Club of Spanish Town	To construct communal sanitation blocks w/toilets, showers, seven wash basin-Ellerslie Pen	10,000	Project in progress	August 31, 2004	Environment/Health
Walkerswood Farmers Group	Walkerswood Pepper Farmers Irrigation Project	8,750	Project completed/Completion date amended	August 31, 2004	Environment (SO2)
Missionaries of the Poor	Purchase of heavy duty truck for the transport of HIV/AIDS patients	17,350	Project completed	September 30, 2004	Environment (SO2)
Olympic Gardens Community Drug awareness	HIV/AIDS Reduction and Prevention Program	10,000	Project completed	September 30, 2004	Democracy & Governance (SO5)
Ashley All Age School	Sanitation Facilities	2,900	Project in progress	November 30, 2004	Environment (SO2)

Updated: Mar-05

Name of Organization	Proposal	Amount	Activity Status	Grant Closed	SO Team Funds
Laura's Basic School	Building Classrooms/Play area	4,150	Project in progress	January 31, 2005	Health (SO3)
Mayfield Basic School	Build bathrooms and kitchen facilities	7,500	Project in progress/completion date amended	January 31, 2005	Environment (SO2)
The Salvation Army	Refurbishing the Men's Hostel and Rehab Centre	10,000	Project in progress	January 31, 2005	Democracy & Governance (SO5)
Multicare Foundation	Refurbishing basketball backboards at 10 inner city schools	3,000	Project in progress	February 28, 2005	Economic Growth (SO1)
		295,141			

Annex C: Suggested Grant Close-out Report

Final Grant Report		
Organization:	Date Begun	
Project Name:	Date Completed	
Location:	First SDAF Grant (Y/N)	
Cost/Total:	Cost – SDAF Grant	
	Cost – Grantee Match	
Description of Project and Objectives:		
General Success (what has been accomplished/completed):		
How will the operation of the activity be sustained after the SDAF Project (who will provide operational resources):		
Beneficiaries – How Many People will benefit from this project (annual benefit):		
General – Provide Comments/Suggestions on the Grant Process:		
Contact Information: (Director/Address)		

Annex D: Data on Field Site Visits

1. Walkerswood Farmers group – Irrigation Project
2. Sandy Banks Primary School – Classroom & Sanitation Facilities
3. Cornerstone Ministries – Vocational Training Center
4. Guava Ridge Skills Training Center
5. Jamaica Association for the Deaf – Hot Stamp Press Machine
6. Barracks Road Primary School – Classroom Construction
7. Portmore Pacesetters Marching Band

Project: Evaluation Data Sheet		
Project: Walkerswood Irrigation Project	Date Begun	August 2003
Organization: Walkerswood Farmers Group	Date Completed	March 2004
Location: Walkerswood, St. Ann	First SDAF Grant	Yes
SO/Sector: SO2 – Environment	Other USAID grants	R2RW
Cost/Total:	Cost/USAID	\$8,750
	Cost/Match	
<p>Description/Objective: The Walkerswood Caribbean Food Company (WWFC) has leased forty acres of land from the government and made it available to the Walkerswood Farmers Group (WWFG), and the land is soon to receive an expanded irrigation system. WWFC guarantees the purchase of all peppers produced on the land, and the Walkerswood Farmers group – 24 members) benefit from use of the land and have a guaranteed market for their produce. The land leased by WWFC from the government is managed by the WWFG, but individuals are responsible for their own production and benefit accordingly by retaining the income from the sale of their individual production. WWFC sells its products in Jamaica and exports to a number of countries, including the US, Canada, Trinidad and England. In addition, the WWFC is able to bulk purchase fertilizer and pesticides and these saving are passed on to the farmers. The Caribbean Agricultural Research and Development Corporation (CARDI) have provided integrated pest management advice and services to the WWFG. Earlier assistance was provided to the WWFG through a grant from the USAID/R2RW project, which provided funds for the land to be tilled and to purchase seedlings.</p> <p>The particular objective of the SDAF grant was to purchase a pond liner to hold water that will be used by the WWFG to water their pepper crop. The pond liner is part of a system that will combine grey water from the factory with factory roof water runoff, run it through a biodigester, and make it available for irrigation. Currently the farmers are purchasing water from the National Water Commission to water their crop. The new irrigation system will reduce the cost of purchasing water from the NWC and increase the availability of water. It is estimated that the water will enable the farmers to double their pepper production.</p>		
Field Notes/Conclusions		
<p>General Success & Impact: The expanded irrigation project is not yet on-line, but it appears as if it will be highly successful. The relationship between the WWFG and the WWCF is highly innovate and appears to provide substantial benefit to both groups: the relationship is an excellent example of a successful corporate-community partnership.</p>		
<p>Sustainability: The irrigation system is part of the new Walkerswood Caribbean Foods factory water system and will be maintained by the WWFC. It is estimated that the members of the Walkerswood Farmers group will be able to double their production due to the increased availability of water, and the company (Walkerswood Caribbean Foods) has guaranteed that they will purchase all of the peppers produced. The availability of increased “free” irrigation water will decrease the farmer’s need to purchase NWC water, which will save the farmers money. In addition, the income of the pepper farmers is likely to increase significantly because of this project.</p>		
<p>Problems/Challenges/Misc: None.</p>		

Project Evaluation Data Sheet		
Project: Sandy Bank Primary School Foundation	Date Begun	August 2003
Organization: Breds – Treasure Beach Foundation	Date Completed	October 2003
Location: Treasure Beach – Sandy Bank	First SDAF Grant	Yes
SO/Sector: SO2 – Environment	Other USAID grants (b/a)	
Cost/Total: \$25,000	Cost/USAID	\$10,000
	Cost/Match	\$15,000
<p>Description/Objective: Breds is a non-profit community organization established in 1998. Breds main objective is support for public education, particularly the local primary school. School support projects have included: establishment of a school computer lab; expansion of the computer donation program beyond Sandy Banks Primary School, to include three other schools; provision of the salary for a remedial reading teacher; donation of a photocopier to the SB school; construction of two additional classrooms, a canteen, a library and bathrooms (to replace pit latrines); and support for a scholarship fund for needy students. In addition, Breds supports other community development initiatives, such as support for fisherman, beach cleanups and a road clean-up program.</p> <p>The project funded by SDAF was the expansion of the school, which included building and establishing a library, building two additional classrooms and building modern bathroom facilities, and expanding the computer lab from 15 to 40 computers.</p> <p>Breds has seven directors and operates totally as a voluntary organization (with no paid staff). Income is generated by voluntary bed-night levies from tourists at Jakes Hotel at Treasure Beach. In addition, funds have been raised from visiting tourists, such as the purchase of an ambulance and first aid training by doctors from New York who visited the hotel.</p>		
Field Notes/Conclusions		
<p>General Success & Impact: Breds is a highly innovative and successful organization, which receives substantial support from the community and from the local hotel (Jakes). The expansion of the school has been completed and the two additional classrooms supported by SDAF were in use during our visit. The library and computer lab expansion have also been completed. The new bathrooms are not yet in use, but are largely complete, and will come into use once a water recycling system is complete. The water system will funnel and filter water from the bathrooms and canteen through a biodigester and, together with collected roof runoff, will be made available to water a new sports field.</p> <p>Overall, Breds is an impressive organization and the SDAF funds have been very well used.</p>		
<p>Sustainability: The Ministry of Education has provided the salaries for the teachers using the new classrooms. In addition, Breds is relatively successful at raising funds and the relationship with Jake's Hotel will provide an on-going source of revenue.</p>		
<p>Problems/Challenges/Misc: None.</p>		

Project Evaluation Data Sheet		
Project: Cornerstone Ministries Vocational Training Center	Date Begun	N/A
Organization: Cornerstone Ministries	Date Completed	2000
Location: St. Catherine	First SDAF Grant	Yes
SO/Sector: Economic Growth	Other USAID grants (b/a)	No
Cost/Total: N/A	Cost/USAID	\$10,000
	Cost/Match	N/A
<p>Description/Objective: To provide funds to buy four containers and some sheet metal to build a vocational education center, which also serves as a community center. The Director of the Center is a charismatic leader who has overseen the construction of an innovative and practical design, whereby the containers have been used for corners of a large building and iron trusses have been placed between and across them to support a roof. Each container serves as a modular classroom/storeroom for different areas of study. Cornerstone is currently providing instruction in electrical work, welding, ICT (in a center established within and adjacent public high school), garment sewing, food preparation and hydroponics.</p> <p>The students must either pay a fee to attend the classes, or, as most are unable to pay, they may contribute labor costs to an activity improve the facility. Currently, the students are also installing an improved facility wiring and lighting system.</p> <p>The Center recently started a chain-link fence making operation. It is hoped that this will become an income source for the center. The area around the school is currently being fenced, which provides practical fence installing experience to those involved.</p>		
Field Notes/Conclusions		
<p>General Success & Impact: The vocational center is active and classes were in session during the field visit. A great deal of vocational training has occurred as a result of USAID's initial investment. The programs of the center have become HEART certified, which provides graduates with national certification for their degrees and aids in getting jobs and entrance to other higher education programs. This project was a highly successful use of SDAF funds.</p>		
<p>Sustainability: The school has strong ties to US-based church groups and gets some financial and material support from those groups. They are also looking at expanding their partnership with the Ministry of Education. The leader is quite dynamic and has received funding from several sources, including periodic support from the local chicken processing facility (Best Dressed Chickens).</p>		
<p>Problems/Challenges/Misc: The school's director has been very impressed with the SDAF Program. He called Mossina Jordan to inquire about USAID support, she visited shortly thereafter, and he had received funding within two weeks – which he thought was quite extraordinary for a donor program.</p>		

Project Evaluation Data Sheet		
Project: Guava Ridge Skills Training Center	Date Begun	N/A
Organization: Guava Ridge Community Center	Date Completed	August 2003
Location: Mavis Bank, St. Andrew	First SDAF Grant	Yes
SO/Sector: SOI Economic Growth	Other USAID grants (b/a)	No
Cost/Total: \$24,000	Cost/USAID	\$8,000
	Cost/Match	\$16,000
<p>Description/Objective: To purchase a stove/oven for a community-operated vocational training center. The training center is operated by the community but receives financial and technical support from HEART (Human Employment and Resource Training), a vocational educational program of the Ministry of Education. The training center offers skills training in food preparation/cooking, house keeping (for hotel employment), English, entrepreneurship, tourism and customer service. Most of the participants are women, but some males also participate.</p> <p>Students do not have to pay a fee for the courses as these costs are covered by HEART. The course, which is geared toward employment in the hospitality industry, lasts six months and can include 16 – 25 students, who must be 18 years or older to participate. The center has one instructor, also paid by HEART. For graduating students, the center also tries to find employment for its students but information on the success of this effort was not available.</p>		
Field Notes/Conclusions		
<p>General Success & Impact: This simple and straightforward project has achieved its objectives. The oven purchased with an SDAF grant is essential to the training done by the center and was in-use at the time of our visit. The kitchen at the center is also used to prepare food for the students, and for others who use the community training center.</p>		
<p>Sustainability: The operation will continue to be sustainable in so long as financial support from HEART continues. It did not appear that the center receives other financial support.</p>		
<p>Problems/Challenges/Misc: No problems were mentioned and the community was very grateful for the support they received.</p>		

Project Evaluation Data Sheet		
Project: Purchasing Hot Stamp Press	Date Begun	July 2003
Organization: Jamaica Association for the Deaf	Date Completed	February 2004
Location: Kingston	First SDAF Grant	Yes
SO/Sector: SO3 Education	Other USAID grants (b/a)	SPA Grant; 3 PCVs
Cost/Total: \$41,296	Cost/USAID	\$10,000
	Cost/Match	\$31,296
<p>Description/Objective: The hot stamp press grant provided funds to purchase a new press-binding machine, which was a technology upgrade within an existing book binding operation. The press is used to produce and bind hardback book covers. The press was purchased in the US and shipping costs were covered by the Association. The new binding machine allowed the organization to more efficiently produce better quality bookbindings (in comparison to its older and outdated machine). The book binding operation fulfills the following objectives: 1) it is a business that generates income for the Jamaica Association for the Deaf; and 2) it provides job skills training for hearing impaired high school students; and 3) it provides a limited number of jobs for hearing impaired persons. The book binding operation is operated as a business and has numerous contracts, including with UWI and many private sector companies.</p> <p>High school students who participated in the training program generally work at the press for three weeks (during breaks in their regular schedule). In the past, the Association has also trained a limited number of disadvantaged inner-city youth (through a partnership with KRC).</p> <p>JAD operates nine schools for the deaf and works in cooperation with the Ministry of Education. JAD's press operation had not previously received USAID funding, although they have previously secured USAID support for their schools program.</p>		
Field Notes		
<p>General Success & Impact: The project has met its objectives of improving the technology and business efficiency of the book binding operation.</p> <p>The Association trains 18-24 student interns per year. Those who show additional interest are able to complete a more extensive skills training program, which may last up to two years. In the past 10 years, 28 students have been fully trained as bookbinders through the two-year program. There are currently 14 former students employed full-time by the operation. A number of students have also secured jobs with other binderies, although specific numbers are not available.</p>		
<p>Sustainability: The operation of the bookbinding program is financially sustained using revenue from contract sales.</p>		
<p>Problems/Challenges/Misc: None – USAID process was easy to deal with. The Association heard about the SDAF through its network effort, which tracks available donor funding in Jamaica.</p>		

Project Evaluation Data Sheet		
Project: Barrack's Road Primary School – Completion of Additional Classrooms	Date Begun	June 2003
Organization: Barrack's Road PTA	Date Completed	January 2004
Location: Montego Bay – Inner City	First SDAF Grant	Yes
SO/Sector: SO4 - Education	Other USAID grants (b/a)	No
Cost/Total: \$20,000	Cost/USAID	\$10,000
	Cost/Match	\$10,000
<p>Description/Objective: SDAF funds were used to build two additional second grade classrooms to help relieve overcrowding at the school. Previously, the school's second grades classes each had 67 and 85 students. The new classrooms will reduce second grade class size to about 42 students per class. In addition, some of the funds were used to finish a school library and computer learning laboratory. The project is managed by the PTA, which works in close collaboration with the school's management.</p>		
Field Notes		
<p>General Success & Impact: All of the construction has been completed as planned and appears to have been built to a very high standard. The classrooms, the library and computer training center were in use during the evaluation visit. The Ministry of Education apparently does not have funding for school expansion, or has only very little money and the classrooms likely would not have been built without SDAF support.</p>		
<p>Sustainability: The project appears fully sustainable. The school was successful and getting the Ministry of Education to cover the costs of the additional second grade teachers who use the new classrooms. The PTA, through local fundraising, is able to cover school maintenance costs.</p>		
<p>Problems/Challenges/Misc: None.</p>		

Project Evaluation Data Sheet		
Project: Purchase of Band Equipment	Date Begun	May 2003
Organization: Portmore Pacesetters Marching Band	Date Completed	Oct. 2003
Location: City of Portmore, St. Catherine	First SDAF Grant	Yes
SO/Sector: SOI – Economic Growth	Other USAID grants (b/a)	No
Cost/Total: \$20,000	Cost/USAID	\$10,000
	Cost/Match	\$10,000
Description/Objective: Purchase of musical equipment for use by youth in Portmore Pacesetters Community Marching Band. The SDAF funds were used to purchase trumpets, bugles, snare drum sets and other drums.		
Field Notes		
General Success & Impact: The band is very active and performs around Jamaica, as well as in an annual parade every year in Tampa, Florida and various other Florida cities. Since receiving the SDAF funds, the band has expanded from 65 members to 200 members. The band's recent activities have included community clean-ups; peace marches; church parades; performing at funeral services; church parades; and performing at the dedication of the USAID warehouse and parking lot! The Band practices at least once a week for three hours in the evening and is an activity that engages youth and provides a source of pride to the participants and to the community.		
Sustainability: Since attaining the SDAF grant, the Portmore Marching Band has gone on to successfully secure another eleven grants from a variety of sources. They have also established a Portmore Marching Band Booster Society as a way of securing regular support from the local business community.		
Problems/Challenges/Misc: None.		